



# SMART Topics

Stefanie Sylte

SMART Systems Development



# Today's Agenda

- Multifactor Authentication
- Random Reminders
- New windows and reports
- We have a process for that
- Questions



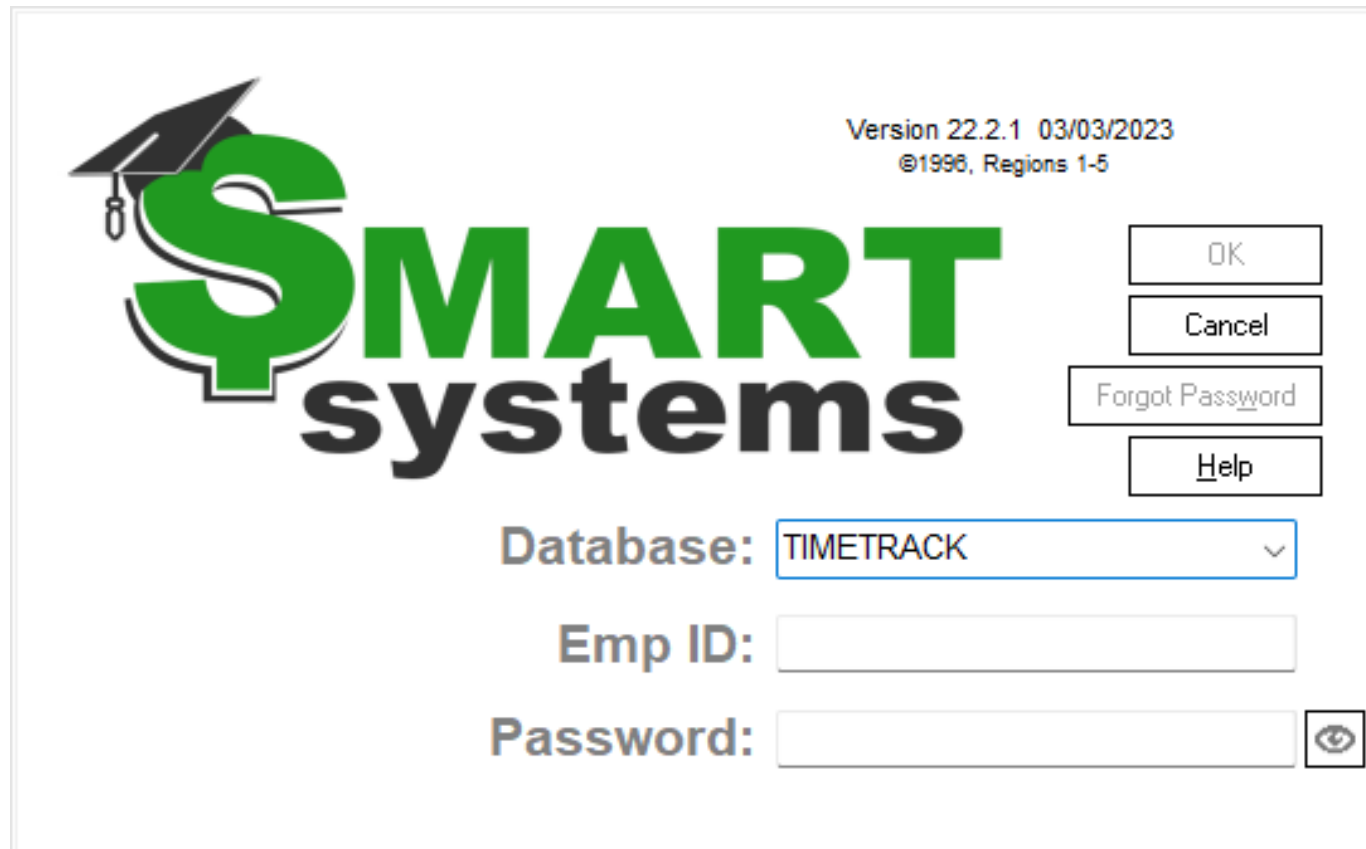
# Multifactor Authentication



# MFA for SMART

SMART now has a Multifactor Authentication code generation option, but will only send email codes.

Login screen will still look the same:



The image shows the SMART systems login interface. At the top left is the SMART systems logo, which features a green graduation cap above a large green dollar sign, followed by the word "SMART" in green and "systems" in black. To the right of the logo, the text "Version 22.2.1 03/03/2023" and "©1998, Regions 1-5" is displayed. Below the logo, there are four buttons: "OK", "Cancel", "Forgot Password", and "Help". The "Forgot Password" button has a small "u" under the "w" in "Password". Below these buttons are three input fields: "Database:" with a dropdown menu showing "TIMETRACK", "Emp ID:" with a text box, and "Password:" with a text box and a toggle icon (an eye in a square) to its right.

Version 22.2.1 03/03/2023  
©1998, Regions 1-5

**SMART**  
systems

OK  
Cancel  
Forgot Password  
Help

Database: TIMETRACK

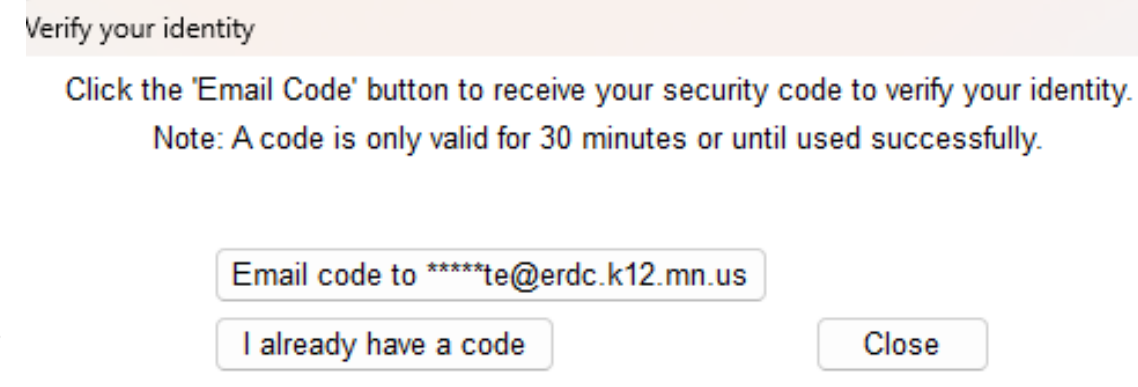
Emp ID:

Password:



# Process:

1. After entering your user id and password, if valid the following screen will display:



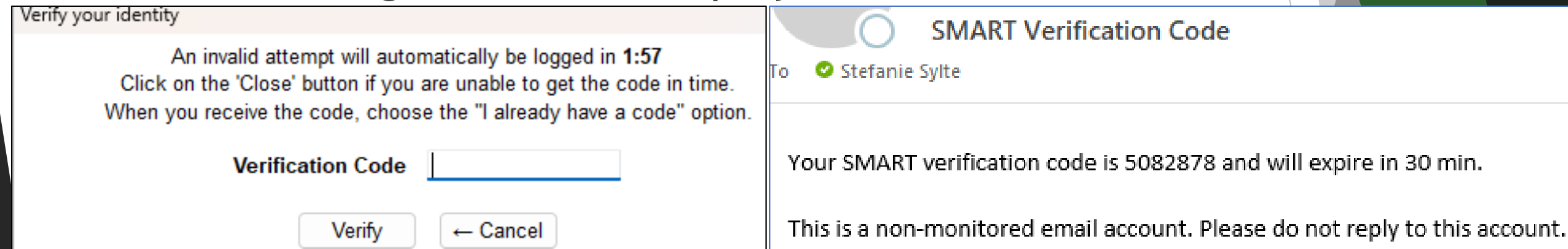
Verify your identity

Click the 'Email Code' button to receive your security code to verify your identity.  
Note: A code is only valid for 30 minutes or until used successfully.

Email code to \*\*\*\*\*te@erdc.k12.mn.us

I already have a code Close

2. Click on the Email code to ... button.  
The following screen will display:



**Verify your identity**

An invalid attempt will automatically be logged in **1:57**  
Click on the 'Close' button if you are unable to get the code in time.  
When you receive the code, choose the "I already have a code" option.

**Verification Code**

Verify ← Cancel

**SMART Verification Code**

To ✓ Stefanie Sylte

Your SMART verification code is 5082878 and will expire in 30 min.

This is a non-monitored email account. Please do not reply to this account.


3. Enter the code emailed and then click the Verify button.



# Random Reminders



# PERA Annual Leave Reporting

 PERA Annual Leave Reporting

Adjustment

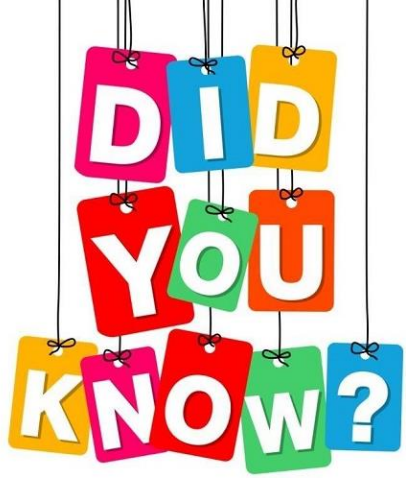
Finalize

Fiscal Year: 2022 Sort: ☐ Id ☒ Name ☐ Leave Reason ☐ Do Not Send All Generate Finalized Data

| Id   | Name                       | Leave Reason  | Leave Start | Leave End  | Hourly Rate                         | Total Hours Missed               | Do Not Send              |
|------|----------------------------|---------------|-------------|------------|-------------------------------------|----------------------------------|--------------------------|
| 713  | Arnold, Raul 713           | Family Leave  | 12/13/2021  | 01/02/2022 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |
| 3426 | Burks, Audrey 3426         | Medical Leave | 07/01/2021  | 07/05/2021 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |
| 1960 | Colon, Marc 1960           | Family Leave  | 07/01/2021  | 08/29/2021 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |
| 3190 | Duffy, Floyd 3190          | Medical Leave | 07/01/2021  | 07/04/2021 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |
| 3722 | Stanley, Alyssa 3722       | Medical Leave | 05/03/2022  | 06/30/2022 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |
| 2287 | Washington, Christian 2287 | Medical Leave | 05/16/2022  | 06/30/2022 | <input type="text" value="\$0.00"/> | <input type="text" value=".00"/> | <input type="checkbox"/> |

- Due for schools on July 31, 2023





For plan years starting in 2023 the ACA affordability percentage is 9.12%.

**Jan renew plan affordability amount =**

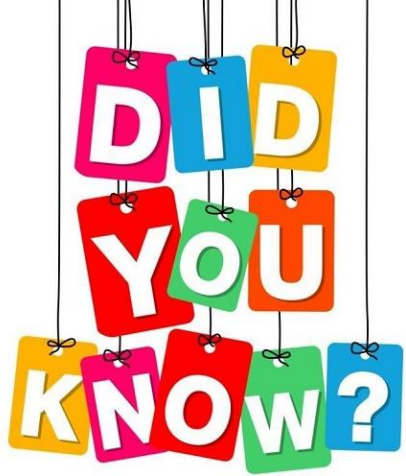
$\$103.28 (13590 \times 9.12\% / 12)$

**Feb-Dec renew plan affordability amount =**

$\$108.83$  after the renew month  $(13,590 \times 9.61\% / 12)$

$\$110.80$  after the renew month  $(14500 \times 9.12\% / 12)$





# There is a tab on the Employee Info window - Custom Info?

**Employee Info** **Change Custom Info Headings**

Select Employee ID 100

Status Changes Supp Info

Click on a heading to change if needed

**Employee Info**

Select Employee ID 100 Amy AAdams AC  
Orig Hire Date 1/1/1999 Adj Hire Date 1/1/1999 NOTES Retire Demographic Flag ☒

Status Changes Supp Info Basic Info Name/Address 3rd Party Info ACA Info Background Contract Info Photo Custom Info Benefit Elig

DISCLAIMER: These fields are unique and are not available on any reports except the Employee Custom Info report. Change Headings

|                       |                      |                    |
|-----------------------|----------------------|--------------------|
| Date Changed 00/00/00 | Alpha 7, 50 chars    | Date 4 00/00/00    |
| District Info1        | Alpha 8, 50 chars    | Date 5 00/00/00    |
| District Info2        | Alpha 9, 50 chars    | Numeric 1, (13, 2) |
| Alpha 3, 20 chars     | Alpha 10, 50 chars   | Numeric 2, (13, 2) |
| Alpha 4, 20 chars     | Custom Date 00/00/00 | Numeric 3, (13, 2) |
| Alpha 5, 20 chars     | Date 2 00/00/00      | Numeric 4, (13, 2) |
| Alpha 6, 50 chars     | Date 3 00/00/00      | Numeric 5, (13, 2) |
| Alpha 11, 250 chars   |                      |                    |
| Alpha 12, 250 chars   |                      |                    |
| Alpha 13, 250 chars   |                      |                    |
| Alpha 14, 250 chars   |                      |                    |
| Alpha 15, 250 chars   |                      |                    |

Save Changes Close



03/09/2020  
4:44 PM

Alpha 6, 50 chars  
Alpha 8, 50 chars  
Alpha 10, 50 chars  
Alpha 11, 250 chars  
Alpha 12, 250 chars  
Alpha 13, 250 chars  
Alpha 14, 250 chars  
Alpha 15, 250 chars

Alpha 7, 50 chars  
Alpha 9, 50 chars



# Wage Statement Signatures tracking

Wage Statement Signatures

Selection

☐ Employee Signed

☐ Hide In eR

☐ 1st Attempt

☐ Comment

☐ eR Ready Date

☐ Mail Date

☐ 2nd Attempt

☐ No Response

00/00/0000

Filter

Show All

Adjust Values

Sort

Employees

Drag Attachment Here

To add an attachment either select the row, and drag and drop the file in the box to the left, or click on the attach button and navigate to the attachment.

| ID                            | Name                   | Fiscal Year | Date Changed      | eR Ready Date | Hide In eR               | Statement Type | Employee ID | Date Viewed | Date Signed | Attach Options | Mail Date  | 1st Attempt | 2nd Attempt | No Response              |
|-------------------------------|------------------------|-------------|-------------------|---------------|--------------------------|----------------|-------------|-------------|-------------|----------------|------------|-------------|-------------|--------------------------|
| 479                           | Atkins, Florence 479   | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       | 206         |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1447                          | Baldwin, Celia 1447    | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       | 206         |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1187                          | Ball, Eric 1187        | 2022        | 1/31/2022 4:05 PM | 2/1/2022      |                          | Original       | 1187        |             | 02/09/2022  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1538                          | Barron, Noah 1538      | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       |             |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 392                           | Benjamin, Jack 392     | 2022        | 1/31/2022 4:05 PM | 2/1/2022      |                          | Original       |             | 2/1/2022    | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1589                          | Bernard, Tyler 1589    | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       |             |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 302                           | Bishop, Rafael 302     | 2022        | 1/31/2022 4:05 PM | 2/1/2022      |                          | Original       | 302         | 2/2/2022    | 02/02/2022  | Attach         | 00/00/0000 | 02/01/2022  | 00/00/0000  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1313                          | Blackburn, Virgil 1313 | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       |             |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 1537                          | Buck, Rodney 1537      | 2022        | 1/31/2022 4:05 PM | 2/1/2022      |                          | Original       | 1537        | 2/1/2022    | 02/01/2022  | Attach         | 00/00/0000 | 02/01/2022  | 00/00/0000  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 834                           | Burns, Rochelle 834    | 2022        | 1/31/2022 4:05 PM | 2/1/2022      | <input type="checkbox"/> | Original       |             |             | 00/00/0000  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |
| 941                           | Carney, Michael 941    | 2022        | 1/31/2022 4:05 PM | 2/1/2022      |                          | Original       | 941         | 2/6/2022    | 02/06/2022  | Attach         | 00/00/0000 | 02/01/2022  | 02/03/2022  | <input type="checkbox"/> |
| Comment: <input type="text"/> |                        |             |                   |               |                          |                |             |             |             |                |            |             |             |                          |

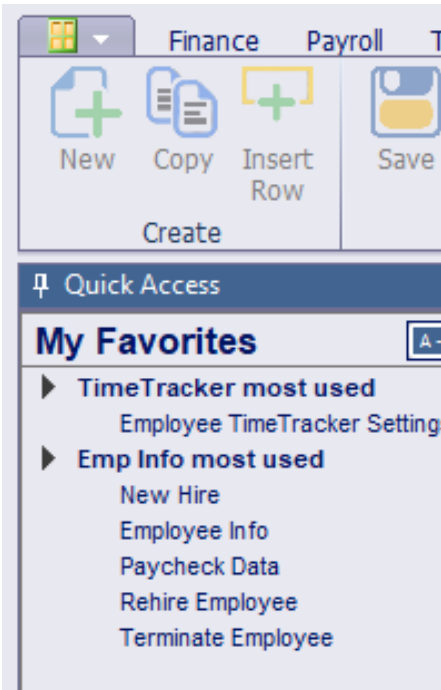
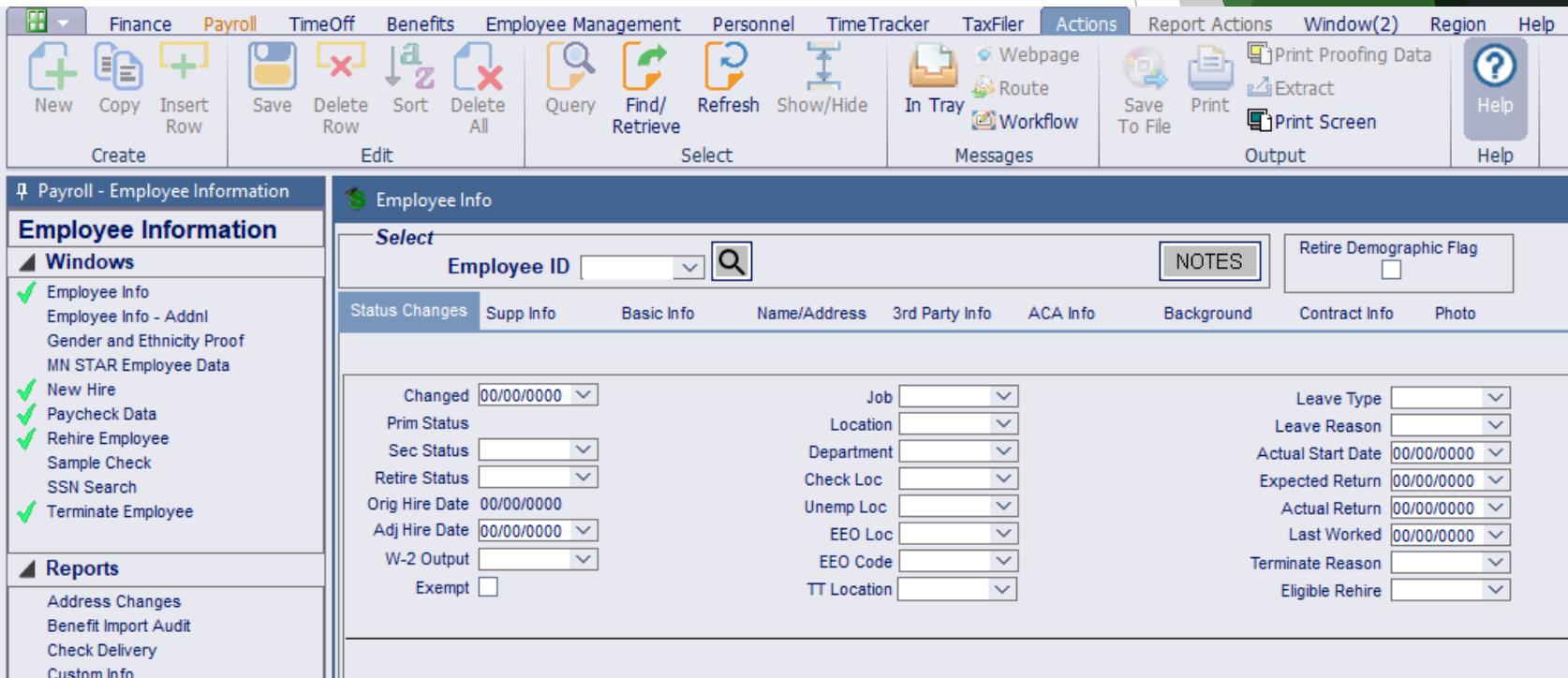


# Help screens

## Menu Group



## Window





# Folders can be built in Employee Notes

Folders are automatically setup for all employees

Employment Notes

Folders

General

Insurance

2022

2023

Career Planning

Disciplinary Action

Continuing Ed Info

Payroll

Amy A.Aadams

Orig Hire Date 1/1/1999 Adj Hire Date 1/1/1999

Print Note

Date

Confidential

Description (Required)

Attachment

Attachment Type

View in SeR

Sign

Active

03/03/2023

Note Added By: Aadams, Aaron A

View Date:

Sign Date:

Add Folder

Add Sub Folder

Delete Note

Insert Note

Rename Folder

Delete Folder

Notes marked as 'Confidential' are only visible to whoever entered them.

The purpose of employee notes is to offer a tool to end users to assist in storing employee information. Each end user should have an understanding of how record regulations impact their unique circumstances. Questions or concerns regarding compliance with existing record retention or what is viewable to district personnel should be directed to someone with proper expertise in this area of regulation.

Drag Attachment Here

Open Attachment

Add Attachment

Hide Inactive


Save

Close



# Employees will be emailed if certain data changes in Payroll...


- Paycheck Data
  - ▶ W4
  - ▶ Direct Deposit


 Your W4 information was changed in SMART HR

To  Stefanie Sylte

Aaron Adams changed your W4 information in SMART HR, effective immediately. If this change was not initiated by you, please contact the business office immediately.

- Employee Information
  - ▶ Address
  - ▶ Email Address: work or home

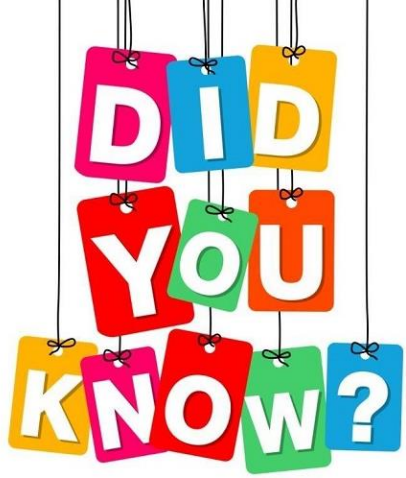
 Your address was changed in SMART HR

To  Stefanie Sylte

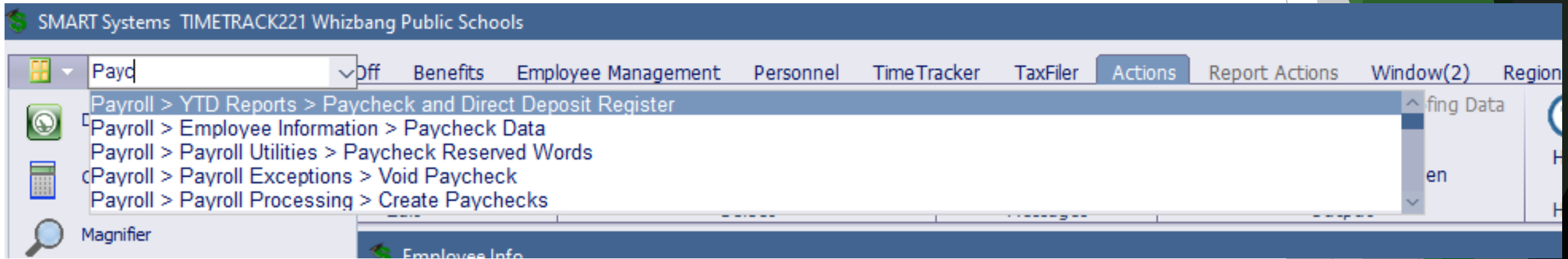
Aaron Adams changed your address in SMART HR, effective immediately. If this change was not initiated by you, please contact the business office immediately.

This is a non-monitored email account. Please do not reply to this account.





If you know the name of a window, but not where it is, you can search for it...





# If you need to check with someone else about data in a window, you can message them in SMART?

The screenshot displays the SMART software interface. At the top, a menu bar includes Finance, Payroll, TimeOff, Benefits, Employee Management, Personnel, TimeTracker, TaxFile, Actions, Report Actions, Window(2), Region, and Help. Below this is a sub-menu with options like Employee Information, Agency Reporting, Payroll Exceptions, and Third Party Processing. A 'Quick Access' sidebar on the left lists 'My Favorites' such as TimeTracker most used and Emp Info most used. The main area shows the 'SMART Dashboard' with 'Finance Defaults' and a 'Messaging - Inbox' table. A 'Workflow Message' window is open in the foreground, displaying a message from 'Aadams, Aaron A' sent on '02/27/2023 4:17 PM'. The message summary is 'ID 1445 - term date' and the reply by is 'Action Review/Comment'. The message body contains the text: 'I thought this person was supposed to be terminated, but I see he is still active?'. At the bottom of the window are buttons for 'Forward', 'Reply', 'Delete', and 'Save to Emp Notes'.

Workflow Message

From Aadams, Aaron A Sent 02/27/2023 4:17 PM Open Attached Window

Summary ID 1445 - term date Open Attached File

Reply By Action Review/Comment

I thought this person was supposed to be terminated, but I see he is still active?

Forward Reply Delete Save to Emp Notes

| From            | Summary                |
|-----------------|------------------------|
| Aadams, Aaron A | ID 1445 - term date    |
| System          | A change to Medical    |
| System          | A change to employ     |
| System          | A change to employ     |
| System          | A change to Medical in |



| Sent          | Reply By | Priority |
|---------------|----------|----------|
| 02/27 4:17 PM |          |          |
| 04/28/2022    |          | Low      |
| 04/28/2022    |          | Low      |
| 04/28/2022    |          | Low      |
| 04/28/2022    |          | Low      |
| 04/28/2022    |          | Low      |





# New Windows and Reports





# SMART Documents





 Dashboard


 Calculator


 Magnifier


 My Favorites...

 In Tray

 Batch

 SMART Client Files

 SMART Documents

 Exit

SMART Documents

Download FileDelete FileAdd FileShow Deleted Files☐Un-Delete File

Folders

- ▶ Benefits
  - ACA
  - COBRA
  - Emp Mgmt
  - Finance
- ▶ Payroll
  - New Hire Forms
  - Personnel
  - TimeOff
  - TimeTracker

| File Name | Description | Added On | Added By |
|-----------|-------------|----------|----------|
|-----------|-------------|----------|----------|

Add FolderAdd Sub Folder

Rename FolderDelete Folder



# Payroll Processing | Paystub Hrs Override

Paystub Hrs Override

Selection of IDs

Setup Information For New Rows

New Rows To Be Created

Finalize

Create Rows

Calendar/Seq: S2023170

Pay Code:

Units:

Date Worked:

Reason:

Rows will be created for these employees:

Employees

Count = 615

|      |                        |
|------|------------------------|
| 2434 | Adams, Ruby 2434       |
| 2638 | Adkins, Andy 2638      |
| 3797 | Aguilar, Maryann 3797  |
| 2264 | Alston, Lori 2264      |
| 3371 | Andrews, Terrance 3371 |
| 3594 | Armstrong, Stacy 3594  |
| 1514 | Arnold, Ivan 1514      |
| 713  | Arnold, Raul 713       |
| 3244 | Atkins, Melody 3244    |
| 3359 | Austin, Lynne 3359     |
| 3819 | Avery, Brandi 3819     |
| 3880 | Avery, Hugo 3880       |
| 3740 | Avila, Pete 3740       |
| 3124 | Avila, Stephen 3124    |
| 2535 | Ayala, Bradford 2535   |
| 3867 | Baker, Gayle 3867      |



# Paycheck Data has a field to enter Paycheck Rate of Pay...

...so that an accurate amount can be entered for employees if their hours fluctuate due to annualized pay.

The screenshot shows the 'Paycheck Data' application window. At the top, there's a 'Select' section with an 'Employee ID' dropdown and a search icon. To the right are 'NOTES' and a 'Retire Demographic Flag' checkbox. Below this is a tabbed interface with tabs for 'Pay Codes', 'Pay Auth', 'Deductions', 'Distribution', 'Taxes', 'Retirement', 'Ck Delivery', 'Pay Detail', 'ACA Info', and 'ACA Pay Codes'. The 'Pay Codes' tab is active. It features a 'Sort by' section with radio buttons for 'Pay Code', 'Start Date', and 'Stop Date', and a dropdown for 'Ascending'. The main area contains a table with columns: 'Pay Code', 'Start Date', 'Stop Date', 'Pay Base', 'Annual Contract', 'Nbr Pds', 'Earn Sched', 'Std Hrs', 'Pay Type', 'Sal Adj', 'As Of', 'Changed By', and 'Date Changed'. Below the table, there are input fields for 'Rate Table', 'Hrs/Day', 'Days/Yr', and 'Hrs/Yr'. To the right of these is a 'Freq:' label and a 'Paycheck Rate of Pay' field, which is circled in red. Further right is a 'Workers Comp' dropdown. At the bottom left, there's a 'Notes:' text area.

| Pay Code | Start Date | Stop Date  | Pay Base | Annual Contract | Nbr Pds | Earn Sched | Std Hrs | Pay Type | Sal Adj | As Of | Changed By | Date Changed |
|----------|------------|------------|----------|-----------------|---------|------------|---------|----------|---------|-------|------------|--------------|
|          | 00/00/0000 | 00/00/0000 | 0.00     | 0.00            |         |            | .000    |          |         |       |            |              |

Double click Rate Table Box for Rate Information

Overrides: Hrs/Day Days/Yr Hrs/Yr

Notes:

Paycheck Rate of Pay: 0.00

Workers Comp:

It will also trigger a disclaimer on all forms of paychecks if used...



# And there is a report:

System: 0241

## Paystub Hrs Override Per PP

12/10/2021

12:16 PM

| Calendar Id    | Pay Date Name             | Pay Code | # of Hrs Reported | Paycheck Rate of Pay |
|----------------|---------------------------|----------|-------------------|----------------------|
| S202204-0      | 08/20/2021                |          |                   |                      |
| 11770          | FRANKLIN, JOY 11770       | COORD    | 38.00             |                      |
| 13083          | COMBS, MARTY 13083        | COORD    | 38.00             |                      |
| 14320          | HANSON, JERALD 14320      | COORD    | 38.00             | 251.41               |
| 14456          | WALLS, TOMMIE 14456       | COORD    | 38.00             | 50.40                |
| 14522          | GARRISON, KATHERINE 14522 | COORD    | 38.00             |                      |
| 14561          | REILLY, MELODY 14561      | COORD    | 38.00             | 33.65                |
| 14598          | SARGENT, MABEL 14598      | COORD    | 38.00             | 48.55                |
| 15213          | BIRD, IRENE 15213         | COORD    | 38.00             |                      |
| 15268          | MCDONALD, GUY 15268       | COORD    | 38.00             | 366.36               |
| 15314          | MCLEOD, HUGO 15314        | COORD    | 38.00             | 29.42                |
| Employee Count |                           | 10       |                   |                      |



# Payroll Utilities - Mass Emp Pay/Deduct Code Maint

Mass Emp Pay/Deduct Code Maint

Selection

Pay Codes

Deduct Codes

☐ Do Not Save All

☐ Old Stop Date

☐ Pay Code

☐ Start Date

☐ Stop Date

☐ Pay Base

☐ Ann Contract

☐ Nbr Pds

☐ Earn Sched

☐ Std Hrs

☐ Hrs/Day

☐ Days/Yr

☐ Hrs/Yr

☐ Contract Hrlly

☐ Contract Daily

☐ Wrkrs Comp

Filter

Adjust Values

Sort

| Id   | Name                   |  | Do Not Save              | Pay Code   | Start Date | Stop Date  | Pay Base | Annual Contract | Nbr Pds | Earn Sched | Std Hrs | Overrides: |         |        | Contract Rate |       |            |
|------|------------------------|--|--------------------------|------------|------------|------------|----------|-----------------|---------|------------|---------|------------|---------|--------|---------------|-------|------------|
|      |                        |  |                          |            |            |            |          |                 |         |            |         | Hrs/Day    | Days/Yr | Hrs/Yr | Hrlly         | Daily | Wrkrs Comp |
| 2434 | Adams, Ruby 2434       |  | <input type="checkbox"/> | XSUBPAR_HR | 07/06/2022 | 00/00/0000 | 15.00    | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 2638 | Adkins, Andy 2638      |  | <input type="checkbox"/> | TEACHER    | 08/29/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | T          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | XTEACH_HR  | 08/29/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 3797 | Aguilar, Maryann 3797  |  | <input type="checkbox"/> | PARA_HR    | 09/21/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | XSTFDEV_HR | 09/21/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | XSUBPAR_HR | 09/21/2022 | 00/00/0000 | 19.71    | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 2264 | Alston, Lori 2264      |  | <input type="checkbox"/> | TEACHER    | 08/29/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | T          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | XTEACH_HR  | 08/29/2022 | 00/00/0000 | 0.00     | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 3371 | Andrews, Terrance 3371 |  | <input type="checkbox"/> | SUBTCH     | 12/18/2021 | 00/00/0000 | 175.00   | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 3594 | Armstrong, Stacy 3594  |  | <input type="checkbox"/> | HIVETM_HR  | 07/06/2022 | 00/00/0000 | 20.09    | 0.00            | 24      | 1          | .000    | 7.000      |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | KDSCLB_HR  | 07/06/2022 | 00/00/0000 | 20.09    | 0.00            | 24      | 1          | .000    | 7.000      |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | LIFETAX    | 01/01/2022 | 00/00/0000 | 1.25     | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
| 1514 | Arnold, Ivan 1514      |  | <input type="checkbox"/> | KDSCLB_HR  | 07/06/2022 | 00/00/0000 | 23.66    | 0.00            | 24      | 1          | .000    | 7.250      | 261.000 |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | KDSSUPR_HR | 07/06/2022 | 00/00/0000 | 25.72    | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | LIFETAX    | 12/21/2021 | 00/00/0000 | 25.75    | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |
|      |                        |  | <input type="checkbox"/> | X5_UNIT    | 07/06/2022 | 00/00/0000 | 23.66    | 0.00            | 24      | 1          | .000    |            |         |        |               |       |            |



# Agency Reporting - Flex Nondiscrimination Test

Extract Flex Nondiscrimination Test

Plan Year Select

From

Thru

Employer Code:

Confirm Date Range

Annual Dep Care Contribution  
Annual HSA Contribution  
Annual Med FSA Contribution  
Annual Pretax Premiums  
Compensation

Get Compensation Amounts From  
☒ Pay Detail

Save and Display Values

Extract Active Data

Criteria

Include Wildcarded Codes Like

Exclude Wildcarded Codes Like

Include The Following Specific Codes

BCGRCHECK  
CHILDSUPP1  
CRUNION  
DCP\_EE  
DCP\_ER  
DCP\_FIXR  
DEFCOMP  
DEFCOMP%  
DEFCOMP%G  
DEFMATCH  
DEFMATCH%G  
DENNOTFLEX  
DENNOTFLXR  
DENTAL  
DENTAL2FLX  
DENTAL2R  
DENTALFLX  
DENTALR  
DUES1  
DUES1%  
DUES2  
FSADEP21  
FSADEP22  
FSADEP23  
FSADEPSP08  
FSAMED23  
GARN\_FED

Add Selected Codes



# Employee Information - SMART eR MFA Information

## SMART eR MFA Information

11/10/2021  
11:06 AM

| Id    | Employee Name         | Date Changed | Location | Union  | Mobile Phone  | Email   |            |
|-------|-----------------------|--------------|----------|--------|---------------|---------|------------|
|       |                       |              |          |        |               | Pref    | Home Email |
| 206   | Aaron AAdams          | 01/01/1999   | 005      |        |               | Neither |            |
| 1     | Amos AAdams           | 01/01/1999   | 005      |        |               | Neither |            |
| 100   | Amy AAdams            | 01/01/1999   | 005      |        |               | Neither |            |
| 14361 | COLLEEN 14361 ABBOTT  | 11/11/2010   | 005      |        | (098)765-4321 | Neither |            |
| 10178 | LILA 10178 ABBOTT     | 01/01/2019   | 005      | BOARD  | (098)765-4321 | Neither |            |
| 15096 | RONNIE 15096 ABBOTT   | 08/12/2019   | 110      | 10     | (098)765-4321 | Neither |            |
| 14403 | WILMA 14403 ABBOTT    | 03/01/2011   | 005      | 10S    | (098)765-4321 | Neither |            |
| 11851 | DERRICK 11851 ACEVEDO | 07/06/2009   | 005      | 04A    | (098)765-4321 | Neither |            |
| 10714 | CORY 10714 ACOSTA     | 07/10/2000   | 320      | 10     | (098)765-4321 | Neither |            |
| 15718 | DOMINGO 15718 ACOSTA  | 08/12/2021   | 120      | 04     | (098)765-4321 | Neither |            |
| 15327 | ANGELO 15327 ADKINS   | 12/14/2016   | 005      | ROCK   | (098)765-4321 | Neither |            |
| 14254 | LUKE 14254 ADKINS     | 07/01/2017   | 005      | 04S    | (098)765-4321 | Neither |            |
| 10502 | MAUREEN 10502 ADKINS  | 08/25/1999   | 110      | 04     | (098)765-4321 | Neither |            |
| 14690 | MYRON 14690 ADKINS    | 02/04/2013   | 005      | 04S    | (098)765-4321 | Neither |            |
| 14614 | OWEN 14614 ADKINS     | 08/01/2012   | 005      | SEASON | (098)765-4321 | Neither |            |
| 14223 | KATRINA 14223 AGUIRRE | 01/27/2015   | 005      | 04S    | (098)765-4321 | Neither |            |
| 12956 | LAVERNE 12956 AGUIRRE | 04/10/1997   | 310      |        | (098)765-4321 | Neither |            |
| 14364 | SHANNON 14364 AGUIRRE | 11/01/2010   | 005      |        | (098)765-4321 | Neither |            |
| 14667 | KATHRYN 14667 ALBERT  | 10/31/2012   | 005      | 04S    | (098)765-4321 | Neither |            |
| 12832 | WILMA 12832 ALBERT    | 08/20/2004   | 130      | 04     | (098)765-4321 | Neither |            |

SMART eR MFA Information

Create Report

| Retrieval Argument(s) | Value(s) |
|-----------------------|----------|
| Primary Status        | AC       |
| Secondary Status      |          |
| Location              |          |

SMART eR MFA Information


SMART eR MFA Information ?

Create Report

| Retrieval Argument(s) | Value(s) | Wildcards                |
|-----------------------|----------|--------------------------|
| Primary Status        | AC       | <input type="checkbox"/> |
| Secondary Status      |          | <input type="checkbox"/> |
| Location              |          | <input type="checkbox"/> |
| Bargaining Unit       |          | <input type="checkbox"/> |
| As Of Date            |          |                          |
| Missing both MFA      | Y        |                          |



# Payroll Setup - Setup New Hire/Rehire Templates

 Setup New Hire/Rehire Templates

Select

Employee Template

View Validation codes

Pay Codes

Pay Auth

Deductions

Distribution

Retirement

TimeOff Plans

Benefit Elig

Acct Code Perm

Permissions

Assignments

| Pay Code  | Start Date                              | Stop Date                               | Pay Base                               | Annual Contract                      | Nbr Pds                                | Earn Sched                     | Std Hrs                           | Pay Type                        | Changed By                       | Date Changed                          |                                   |
|---|---|---|--|--------------------------------------|--|--------------------------------|-----------------------------------|---------------------------------|----------------------------------|---------------------------------------|-----------------------------------|
| <input type="text" value="TEACHER"/>              | <input type="text" value="09/01/2022"/> | <input type="text" value="08/31/2023"/> | <input type="text" value="0.00"/>      | <input type="text" value="0.00"/>    | <input type="text" value="24"/>        | <input type="text" value="T"/> | <input type="text" value=".000"/> | <input type="text" value="01"/> | <input type="text" value="206"/> | <input type="text" value="3/3/2023"/> |                                   |
| Rate Table: <input type="text" value="TEACHERR"/> |   |   | <input type="text" value="42,220.00"/> | <input type="text" value="BA"/>      | <input type="text" value="01"/>        | <input type="text" value="*"/> | <input type="text" value="*"/>    | Freq: ALL                       |                                  |                                       |                                   |
| Hrs/Day   |   |   | Days/Yr                                |                                      | Hrs/Yr                                 |                                | Paycheck Rate of Pay              |                                 |                                  |                                       | Workers Comp                      |
| Overrides: <input type="text" value="8.000"/>     |   |   | <input type="text" value=".000"/>      | <input type="text" value="183.000"/> | <input type="text" value="1,464.000"/> |                                | <input type="text" value="0.00"/> |                                 |                                  |                                       | <input type="text" value="8868"/> |
| Notes: <input type="text"/>                       |   |   |  |                                      |  |                                |                                   |                                 |                                  |                                       |                                   |



# New Hire changes

New Hire

Select

Employee ID

Transfer from Emp Mgmt

Employee Basic Information

Social Security Card Info

\* First Name

Middle Name

\* Last Name

\* SSN

\* Birth Date    Age:

\* Gender

Language

Privacy

Employee Type

PERA Number

TRA Number

SMART eR Access

Federal Race and Ethnicity:

\* Ethnicity:

\* Race(s):

American Indian or Alaska Native ☐

Asian ☐

Native Hawaiian or Other Pacific Islander ☐

Black or African American ☐

White ☐

Status Info

Address Info

ACA Info

Supp Info

3rd Party Info

Benefit Elig

Primary Status

\* Secondary Status

Retire Status

\* Orig Hire Date

Adj Hire Date

\* Department

Job

\* Location

\* EEO Location

\* EEO Code

Check Location

\* Unemployment Location

TimeTracker Location

Exempt ☐

Copy Payroll

Copy Emp Management

Copy TimeTracker

ID to be copied

Enter Start Dates:

Pay Codes

Pay Authorization

Employee Template

Start Date

Deductions

Retirement

Timeoff

Distribution

OR ☐ Build defaults from Employee Templates



# Rehire Employee changes

Rehire Employee

Select

Employee ID

Julius 429 Abbott TR 90  
Orig Hire Date 8/31/1998 Adj Hire Date 8/31/1998

NOTES

Transfer from Emp Mgmt

Employee Basic Information

Social Security Card Info

\* First Name

Middle Name

\* Last Name

\* SSN

\* Birth Date  Age:

\* Gender

Language

Privacy

Employee Type

PERA Number

TRA Number

SMART eR Access

Federal Race and Ethnicity:

\* Ethnicity:

\* Race(s):  

☐ American Indian or Alaska Native

☐ Asian

☐ Native Hawaiian or Other Pacific Islander

☐ Black or African American

☒ White

Status Info

Address Info

ACA Info

Supp Info

3rd Party Info

Benefit Elig

Date Changed

Address Type

\* Address Line 1

Address Line 2

\* City/State/Zip/Country

First/Middle/Last Name

Copy Payroll

Copy Emp Management

Copy TimeTracker

ID to be copied

Enter Start Dates:

OR ☐ Build defaults from Employee Templates

Pay Codes  Pay Authorization  Employee Template



# Payroll Utilities - Cleanup Paycheck Data

 Cleanup Paycheck Data

**Tab Selection**  
☒ Distribution ☐ Pay Code Stopped Rows ☐ Deduct Stopped Rows

**Distribution** Pay Code Stopped Rows Deduct Stopped Rows *Note: Reserved Word Regen needs to be run after changes to this window are complete to take effect.*

☐ Pay Code ☐ Status ☐ Stop Date

Filter

Update From Emp Pay Codes Sort by Pay Code

Do Not Save All ☐

| ID  | Name                 | Pay Code   | Status  |
|---|----------------------|------------|---|
| GL Account                                    | Start Date           | Stop Date  | Percentage Do Not Save                        |
| 1408  | Acosta, Agnes 1408   | SUBTCH     | TR  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 10/24/2001 01/25/2002 |                      |            |   |
| 01-100-203-000-000-145                        | 10/24/2001           | 00/00/0000 | 1.0000000 <input type="checkbox"/>            |
| 2638  | Adkins, Andy 2638    | XTENNIS    | AC  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 09/20/2022 11/05/2022 |                      |            |   |
| 11-201-296-120-000-185                        | 09/06/2022           | 00/00/0000 | 1.0000000 <input checked="" type="checkbox"/> |
| 2638  | Adkins, Andy 2638    | XTENNISG   | AC  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 08/21/2022 11/05/2022 |                      |            |   |
| 11-300-296-120-000-185                        | 09/15/2017           | 00/00/0000 | 1.0000000 <input checked="" type="checkbox"/> |
| 3852  | Albert, Daryl 3852   | XFOOTBALL  | AC  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 09/20/2022 11/05/2022 |                      |            |   |
| 11-201-294-113-000-185                        | 08/22/2022           | 00/00/0000 | 1.0000000 <input checked="" type="checkbox"/> |
| 1906  | Allison, Connie 1906 | SUBTCH     | TR  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 10/28/2005 01/20/2006 |                      |            |   |
| 01-300-211-000-000-145                        | 10/28/2005           | 00/00/0000 | 1.0000000 <input type="checkbox"/>            |
| 1561  | Alvarez, Carrie 1561 | SUBTCH     | TR  |
| Pay: 01/01/1996                               |                      |            |   |
| Paycheck Data Pay Code: 11/22/2002 12/27/2002 |                      |            |   |
| 01-100-203-000-000-145                        | 11/22/2002           | 00/00/0000 | 1.0000000 <input type="checkbox"/>            |



# General Ledger - Payroll/Finance Comparison

This report will compare Payroll to what Finance has

Payroll - General Ledger

General Ledger

Windows

- Change to New Accounts
- Correct Timecard Distribution
- Create General Ledger Entries
- Stop Invalid Account Codes

Reports

- Budget Information
- Cash Activity
- GL Benefits by Fund
- GL Entries by Credit Account
- GL Entries by Debit Account
- GL Entries by Debit Account by Name
- GL Entries by Debit Acct Summary
- GL Entries by Employee
- GL Gross Pay by Fund
- GL Net Pay by Fund
- GL Pivot Report
- Liability Activity
- Liability Credit
- Liability Credit Summary - by Payee
- MN SEDRA Reporting
- Payroll / Finance Comparison
- Salaries Payable Detail
- Salary Distribution Detail

Payroll / Finance Comparison

Create Report

Retrieval Argument(s)

Value(s)

Account Type

\* E

Begin Acct Date

\* 07/01/22

End Acct Date

\* 06/30/23

Source

\* SHR

Variance Total <> 0.00

\* N

## Payroll / Finance Comparison

Begin Acct Date: 7/1/2021

End Acct Date: 6/30/2022

Source: SHR

Acct Type: E - Debit

2/27/23

4:26 PM

### Calendar Account

#### S2022010

|                        | Payroll Amount | Finance Amount | Variance |
|------------------------|----------------|----------------|----------|
| 01-005-020-000-000-110 | \$4,782.42     | \$4,782.42     | \$0.00   |
| 01-005-020-000-000-210 | \$370.73       | \$370.73       | \$0.00   |
| 01-005-020-000-000-218 | \$398.85       | \$398.85       | \$0.00   |
| 01-005-020-000-000-220 | \$1,327.05     | \$1,327.05     | \$0.00   |
| 01-005-020-000-000-230 | \$3.32         | \$3.32         | \$0.00   |
| 01-005-020-000-000-240 | \$8.41         | \$8.41         | \$0.00   |
| 01-005-020-000-000-250 | \$152.29       | \$152.29       | \$0.00   |
| 01-005-108-000-302-170 | \$2,630.98     | \$2,630.98     | \$0.00   |
| 01-005-108-000-302-210 | \$201.27       | \$201.27       | \$0.00   |
| 01-005-108-000-302-214 | \$197.32       | \$197.32       | \$0.00   |
| 01-005-108-000-302-230 | \$3.91         | \$3.91         | \$0.00   |
| 01-005-108-000-302-240 | \$4.63         | \$4.63         | \$0.00   |
| 01-005-108-000-302-250 | \$52.08        | \$52.08        | \$0.00   |
| 01-005-110-000-000-180 | \$5,579.56     | \$5,579.56     | \$0.00   |
| 01-005-110-000-000-210 | \$406.60       | \$406.60       | \$0.00   |
| 01-005-110-000-000-214 | \$418.47       | \$418.47       | \$0.00   |
| 01-005-110-000-000-220 | \$1,424.32     | \$1,424.32     | \$0.00   |
| 01-005-110-000-000-221 | \$150.00       | \$150.00       | \$0.00   |
| 01-005-110-000-000-230 | \$7.82         | \$7.82         | \$0.00   |
| 01-005-110-000-000-240 | \$9.82         | \$9.82         | \$0.00   |
| 01-005-110-000-000-250 | \$162.50       | \$162.50       | \$0.00   |
| 01-005-760-000-720-110 | \$843.96       | \$843.96       | \$0.00   |
| 01-005-760-000-720-210 | \$65.42        | \$65.42        | \$0.00   |
| 01-005-760-000-720-218 | \$70.39        | \$70.39        | \$0.00   |
| 01-005-760-000-720-220 | \$234.19       | \$234.19       | \$0.00   |
| 01-005-760-000-720-230 | \$0.59         | \$0.59         | \$0.00   |
| 01-005-760-000-720-240 | \$1.49         | \$1.49         | \$0.00   |
| 01-005-760-000-720-250 | \$26.88        | \$26.88        | \$0.00   |



The background features a light grey gradient on the left, transitioning into a series of overlapping, semi-transparent geometric shapes in various shades of green and dark grey on the right side.

We have a process for that...



# I have a spreadsheet, but don't want to do data entry...

- Timecard Import
- ACA Hours Import
- ACA Covered Individual Import
- Mass Update Emp Work Email
- TimeOff Activity- File Import
- Benefit Import for Deductions

☐ Import txt File Has Header Row  
(first row will not be imported)

[View File Layouts](#)

[Import Pay](#)

[Import Deduct](#)

[Export Templates](#)



# I need OSHA information...

1. *Supervisor's Report of Accident* can be entered in eR by Supervisors or in HR by the business office.
2. The SRA will load into the *First Report of Injury* which populates the MN DOL's pdf form which can be sent out.
3. If an employee has a *Workers Compensation Claim*, additional information can be tracked.
4. All of the information entered is summarized into the *OSHA Form 300* to post or an *OSHA Form 300A* can be created.
5. A file of the information can be created to upload to the DOL in the *OSHA Filing 300A* window.





# I have a flex plan...

Vendor Extracts - Pre-Tax Deducts

Select a Vendor

Compliance - Omni

Compliance - Aviben

Further

WEX

MSRS - HCSP

MSRS - MNDCP

Payee

☐ Include VEBA

Calendars

| Fed Entity | Pay Cycle | Check Date | Calendar   |
|------------|-----------|------------|------------|
| 416003819  | SEMIMONTH | 02/17/2023 | S202316-0  |
| 416003819  | SEMIMONTH | 02/03/2023 | S202315-0  |
| 416003819  | SEMIMONTH | 01/24/2023 | S202314S-0 |
| 416003819  | SEMIMONTH | 01/20/2023 | S202314-0  |
| 416003819  | SEMIMONTH | 01/05/2023 | S202313-0  |

Preview of Datafile (WEX FSA)

| Employee Identifier | Contribution Date | Contribution Description | Contribution Amount | Plan Name | Prior Tax Year |
|---------------------|-------------------|--------------------------|---------------------|-----------|----------------|
|---------------------|-------------------|--------------------------|---------------------|-----------|----------------|

VEBA

| Plan Number | SSN | First Name | Last Name | Y |
|-------------|-----|------------|-----------|---|
|-------------|-----|------------|-----------|---|

HSA

| Employee Identifier | Contribution Date | Contribution Description | Contribu |
|---------------------|-------------------|--------------------------|----------|
|---------------------|-------------------|--------------------------|----------|

HRAR

| Employee Identifier | Contribution Date | Contribution Description | Contribu |
|---------------------|-------------------|--------------------------|----------|
|---------------------|-------------------|--------------------------|----------|

Fix Missing Paye



Calendar that includes Oct 1: S202207 ☐ P2 ☐ P3 Top ☐ P3 Bottom Start Over OENUM Number Set OENUM Generate File Finalize Report

---

|----- Report P2 -----| |----- Report P3 top half -----| |----- Report P3 bottom half -----| |-- Report P3 --|

FT Hispanic FT Non-Hispanic Full Time Report PT Hispanic PT Non-Hispanic Part Time Report NH Hispanic NH Non-Hispanic New Hire Report PT/NH Report

1. Employees gender in S
2. Use the Ge  
Employee I  
information
3. Mass setup  
window.
4. Create and  
*EEO5* windo
5. When finish
6. Upload file



# I need to do Seniority reporting...

Per person

By Assignment

Personnel - Leaves

Leaves and No

Windows

Leave Request For

Place Employee On

Return Employee Fr

Terminate Employee

Reports

Employees on Leav

Leave Request Stat

Non-Renewal Of Pr

Projected Leave Re

Sen by Adj Hire Arc

Sen by Seniority Da

Sen Listing Archive

Seniority Info

Termination Statistic

Termination Statistic

Terminations by Dat

Employee Management - Assignme

Assignments

Windows

Maintain Assignments - One Employee

Maintain Assignments-Multiple Employ

Maintain Assignments Addl Info-Multi

Create Assignments - Multiple Employ

Setup Contract/Assignment Data

Contract/Assignment Signature Track

View Vacancies

Create/Maintain Applicant

Setup Applicant Contract/Assign Date

Applicant Contract Signature Tracking

Reports

Applicant Assignment Info

Applicant Assignment Info-Addl

Assignment Analysis

Assignment Information

Assignment Information-Addl

Contract/Assignment History

Finalized Contract/Assign Data Summ

FTE Count by Location

Sen Assign by Adj Hire Archive

Sen Assign by Seniority Date Archive

Sen Listing with Assignment Archive

Seniority w/Assignment Info

Seniority w/ Assignment Info

Employee Selection

Lic Assign by Adj Hire Date

Listing with Assignment

Create Report

Choose Report: ☒ Lic Assign by Adj Hire Date ☐ Listing with Assignment ☐ Lic Assign by Seniority Date

Sort Employees by ☐ Name ☐ ID

\* As Of Date: 00/00/0000 Use Primary Assignment Only? ☐

Show only active employees ☐ Employee Filter

Use Previous Temp Selections

Primary Status

AC Active Employee

LV On Leave

TR Terminated

Assignment Group

01 Superintendent

02 Principals

03 Teachers

04 District Wide Staff

05 Business Office

Secondary Status

01 Active 12 month Full Time

02 Active 10 month Full Time

03 Active 12 month Part Time

04 Active 10 month Part Time

05 Active 9 month Full Time

Organization

005 District Wide

015 M<sub>2</sub> Elementary

023 M<sub>1</sub> st Wide

072 M<sub>2</sub> st Wide

123 M<sub>2</sub> Elementary

Leave Reason

EXTENDED Extended Leave

FAMILY Family Leave

LEGISLATIVE Legislative Leave

MATERNITY Maternity Leave

MEDICAL Medical Leave

Program

010 Board of Education

020 Superintendent

030 Instructional Admin

050 Principal

105 General Admin Support

Pay Code

TEACHER Teacher Contract

Delete Temp Information (leaving all unchecked will delete all)

Id Assign Group

☐ ☐

Delete Temp

| ID   | Name                   |       |
|------|------------------------|-------|
| 206  | Aadams, Aaron A        | AC 01 |
| 1    | Aadams, Amos A         | AC 01 |
| 100  | Aadams, Amy A          | AC 01 |
| 1057 | Acevedo, Adrienne 1057 | TR OT |
| 407  | Acosta, Desiree 407    | TR OT |
| 875  | Acosta, Dominick 875   | AC 01 |
| 1445 | Acosta, Gerald 1445    | AC 06 |
| 219  | Adkins, Mercedes 219   | TR OT |
| 1351 | Adkins, Wanda 1351     | TR OT |
| 1038 | Albert, Cecil 1038     | AC 01 |
| 240  | Albert, Domingo 240    | TR OT |
| 300  | Albert, Laurence 300   | TR RS |
| 550  | Alford, Christy 550    | TR OT |
| 585  | Alford, Maryann 585    | AC 01 |
| 635  | Allen, Olga 635        | AC 06 |
| 984  | Allison, Woodrow 984   | TR OT |
| 428  | Alvarado, Nicolas 428  | TR OT |
| 781  | Alvarez, Clinton 781   | TR OT |
| 337  | Alvarez, Silvia 337    | TR OT |
| 70   | Andrews, Edith 70      | TR RT |
| 808  | Andrews, Floyd 808     | TR NR |
| 19   | Anthony, Kay 19        | AC 05 |
| 518  | Armstrong, Sophia 518  | TR RT |
| 1234 | Arnold, Jimmy 1234     | TR LY |
| 27   | Arnold, Johanna 27     | TR OT |



# I need to do Civil Rights reporting...*anticipated Summer 2023*

*Sections STAF-1 and STAF-2-3 can be created by SMART*

1. *Pay Detail* must be setup.
2. Use the *CRDC Reporting* window to proof and create data.

CRDC Reporting

Fiscal Year 2022 ▼ Note: Select a year first then select the tab you want to retrieve and then retrieve. All tabs cannot be retrieved at once. Pay Detail must be setup in order to retrieve correct data.

STAF-1

STAF-2-3

School Counselors and Support Services FTE

Security Specialists (includes Security Guards and Sworn Law Enforcement)

☒ Counselors ☐ Nurses ☐ Psychologists ☐ Security Specialists ☐ Social Workers Include All ☒

CRDC STAF-4.5 (Counselors)  
2022

| Location                    | ID | Name               | Pay Code | GL Account             | Hrs/Day | Days/Yr | Hrs School Day | Total Days | Calc FTE | Include                             |
|-----------------------------|----|--------------------|----------|------------------------|---------|---------|----------------|------------|----------|-------------------------------------|
| 300 - Secondary Svcs        | 54 | Pearson, Nadine 54 | TEACHER  | 01-300-710-000-317-165 | 8.000   | 184.000 |                |            |          | <input checked="" type="checkbox"/> |
| FTE Total for location 300: |    |                    |          |                        |         |         |                |            | 0.00     |                                     |
| Grand Total FTE:            |    |                    |          |                        |         |         |                |            | 0.00     |                                     |



# I need to terminate an employee, but need to keep track of data...

1. Use the *Termination*

Payroll, TimeTrack  
permissions

2. Reports to track

- *Termination S*
- *Termination S*
- *Terminations*
- *Turnover by L*
- *Turnover by L*

Terminate Employee

Select

Employee ID

Irma 3472 Bruce AC 30B21  
Orig Hire Date 6/17/2019 Adj Hire Date 6/17/2019

NOTES

Termination Information

Termination Date

Last Date Worked

Stop Payroll Date  02/20/2023 Or After

Stop Benefit Date

Stop TimeOff Date  12/05/2022 Or After

ACA Term Date  (last day worked)

ACA End Coverage  (last covered day) **Ins Date Enroll:** 00/00/0000

Stop Assignment

Stop TimeTracker  Supr Replace ID

Eligible For Rehire

Secondary Status

Termination Reason

Retire Status

ACA / W-2 Output

SMART eR Access

Stop Software Permissions

Check Location

Property Assigned To Employee

| Type                      | Property Id | Location     | Date Issued | Date Returned                           | Comments             |
|---------------------------|-------------|--------------|-------------|---|----------------------|
| CELL<br>School Cell Phone | 123456      | Location-100 | 01/01/2023  | <input type="text" value="00/00/0000"/> | <input type="text"/> |
| ID<br>Identification Card | B123456     | Location-100 | 01/01/2023  | <input type="text" value="00/00/0000"/> | <input type="text"/> |
| PC<br>Personal Computer   | 12345678970 | Location-100 | 01/01/2023  | <input type="text" value="03/03/2023"/> | <input type="text"/> |



# I have annualized hourly employees wages...

1. *Schedules* can be created by employee groups.
2. Employees can *clock in/out or enter timesheets* in SMART eR.
  - Contract time will count toward contract pay and additional hourly time will be paid by timecards.
  - If an employee works more than 40 hours, overtime will automatically be generated per DOLs rules.
3. Employees are paid...correctly based on the hours they work.
4. An audit trail of the information will be stored in the system in case there ever is a DOL audit.



Questions?

